

MANAGER GUIDE

Managing Employee Records

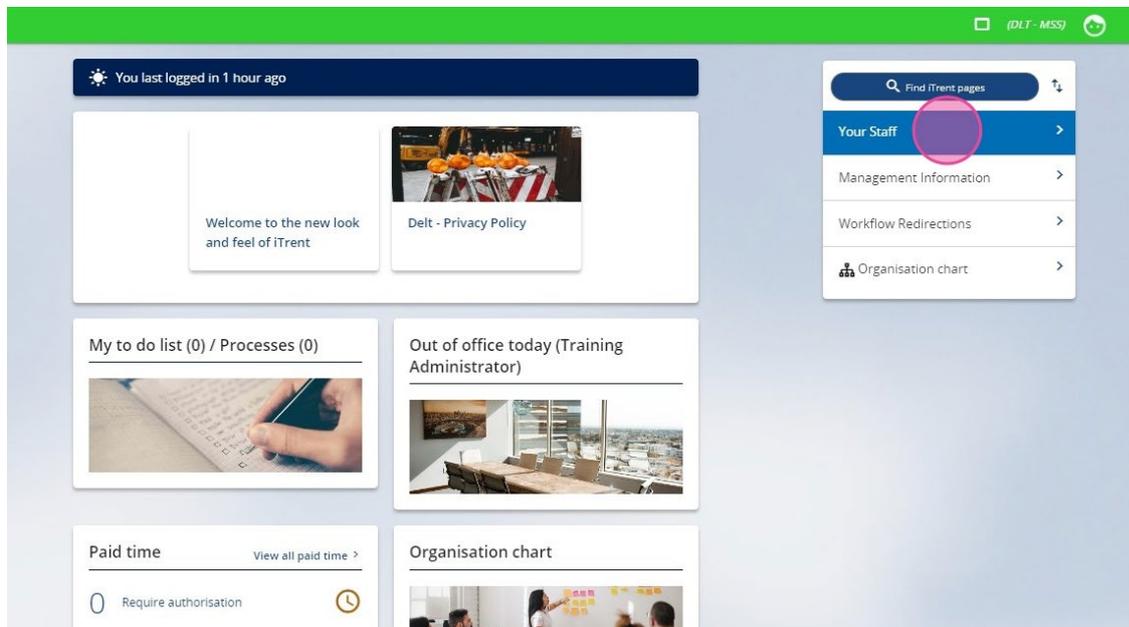
This guide is a brief overview for managers looking to effectively manage employee records within the Manager Dashboard. It outlines a process for accessing and updating employee information, ensuring that you can maintain accurate records on personal details, employment status, and more.

Contents

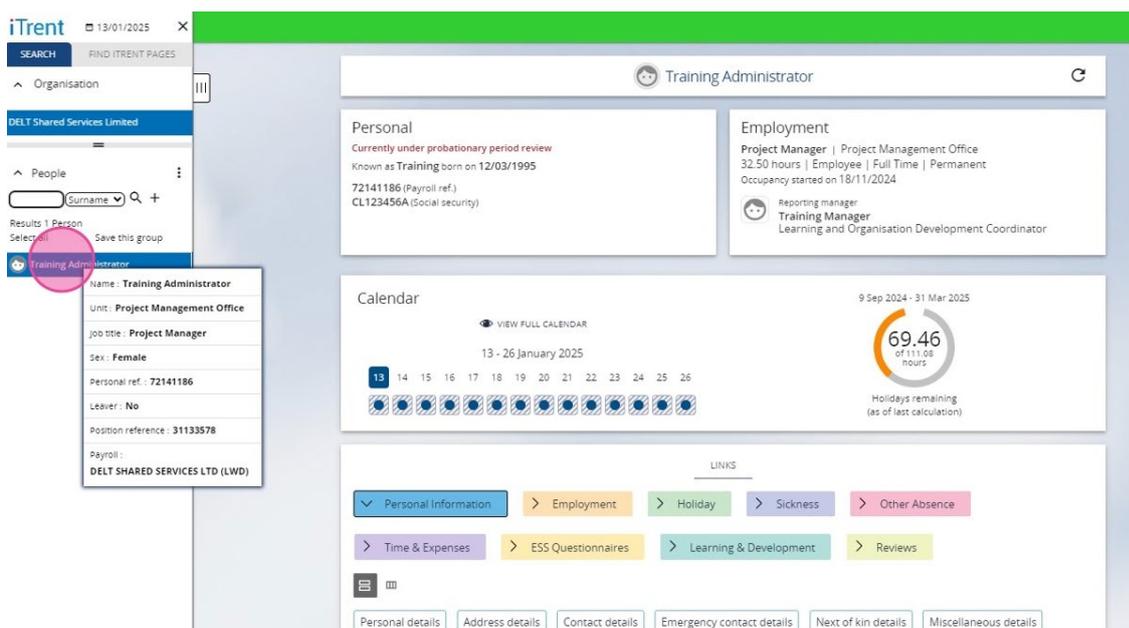
Overview	3
Adding A Vehicle on Behalf of Your Employee	6

Overview

1. From the **Manager Dashboard**, navigate to **"Your Staff"** to view the list of employees under your management.



2. Use the **left-hand search pane** to find and select the employee whose records you need to view or update. You can enter an asterisk (*) in the surname field to return all relevant employees. This includes both employees you manage directly and those they manage.

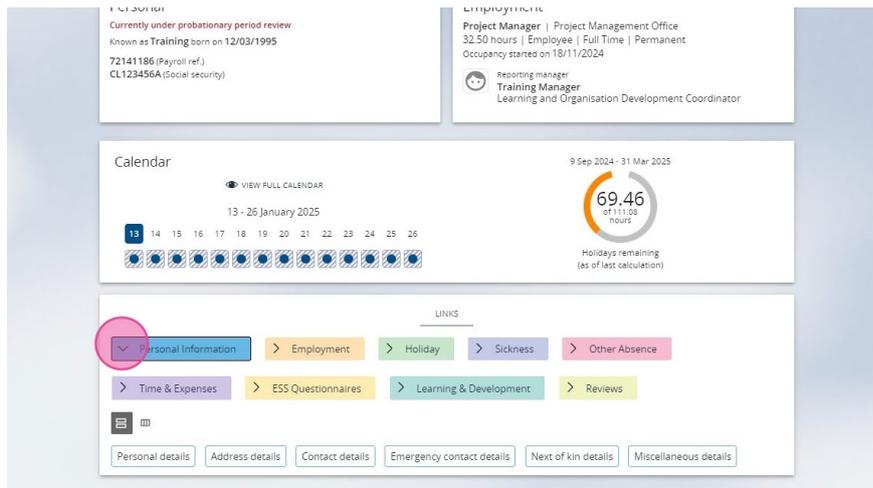


3. Scroll to the **Links** section and choose the relevant category for the information you need to access.

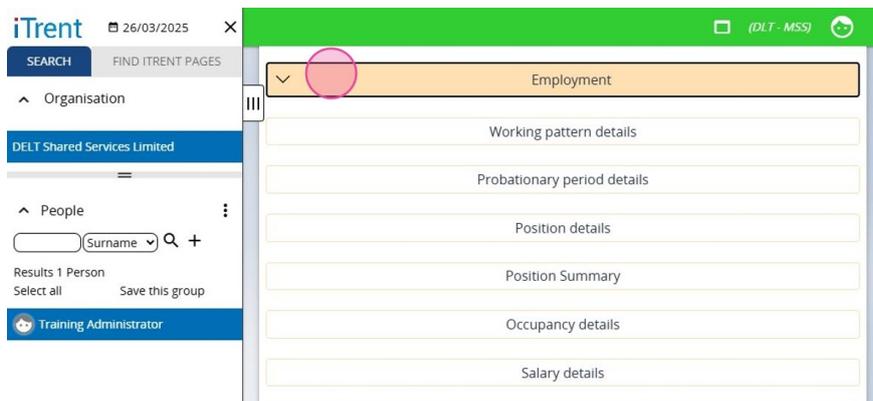
For example, selecting **"Personal Information"** will display tabs such as:

- **Personal Details**
- **Address Details**
- **Contact Details**

Select the appropriate tab, update the necessary information on the next screen, and **ensure you save any changes** before exiting.



4. Under the **"Employment"** section, you can also view the following information:



5. Other dropdown sections allow you to view and manage:

- **Sickness Records**
- **Holidays & Leave**
- **Time & Expenses**
- **Learning & Development**

SEARCH FIND ITRENT PAGES

Organisation

DELT Shared Services Limited

People

Surname

Results 1 Person

Select all

Save this group

Training Administrator

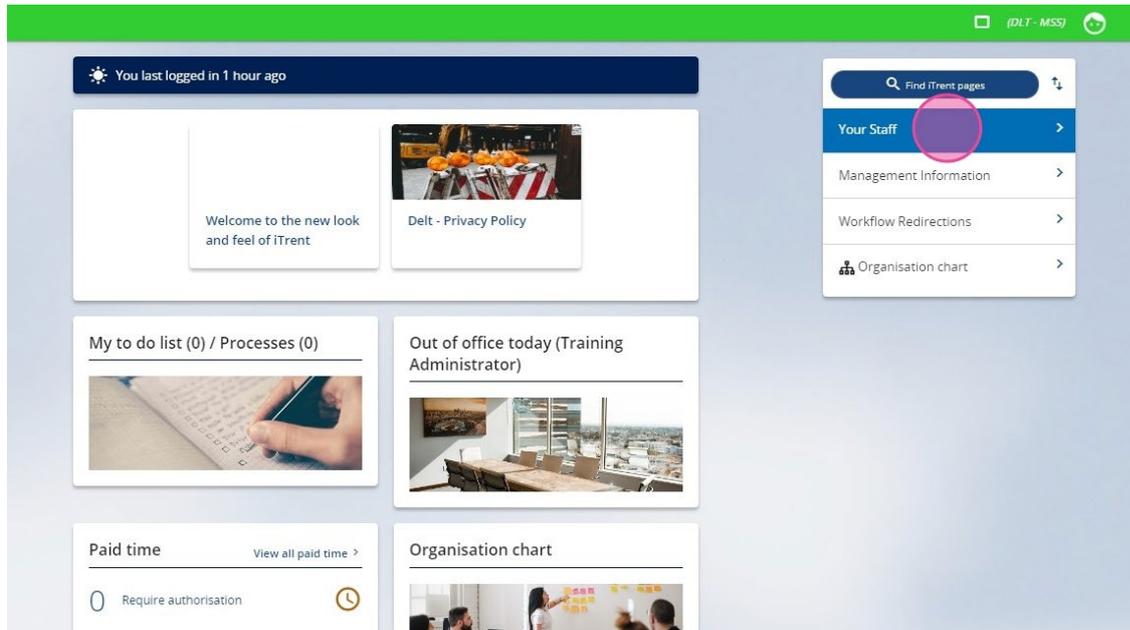
Holiday

- Holiday absence details
- New - Holiday absence
- Holiday entitlement summary
- Absence calendar
- Sickness
- Other Absence
- Time & Expenses
- ESS Questionnaires
- Learning & Development
- Reviews

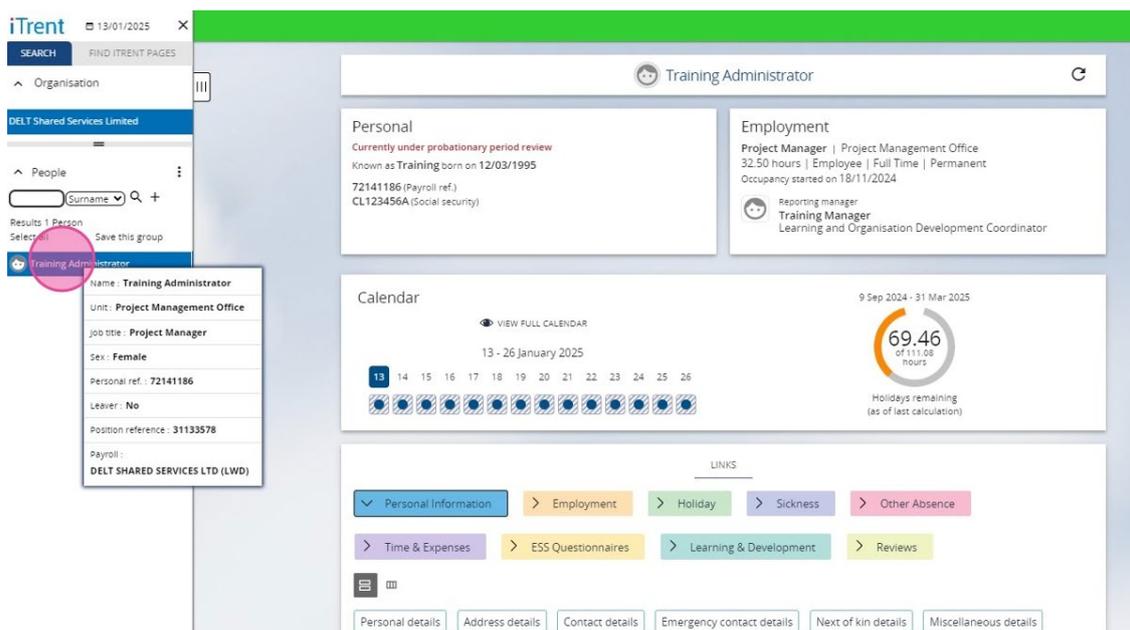
Adding A Vehicle on Behalf of Your Employee

As a manager, you may need to submit a mileage claim on behalf of your employee. First, you will need to add a vehicle for them and select it as their default. Please follow the steps below.

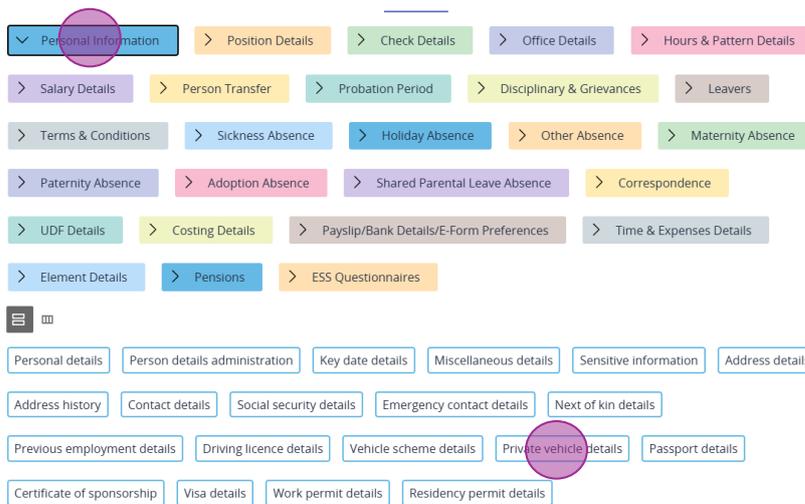
1. From the **Manager Dashboard**, navigate to **"Your Staff"** to view the list of employees under your management.



2. Use the **left-hand search pane** to find and select the employee whose records you need to view or update.



3. Scroll to links. Click **Personal information**, then **Private vehicle details**.



4. Complete the following form, ensuring all fields with an asterisk are filled. If you want this vehicle to be the employee's default vehicle when inputting mileage claims, make sure the **Default vehicle for expenses** box is checked.

5. Click **Save**.

A screenshot of the 'Private vehicle details' form. The form is titled 'Private vehicle details New' and has a 'MENU' icon in the top right. The form is divided into two sections: 'Vehicle' and 'Insurance'. The 'Vehicle' section contains the following fields: 'Vehicle type *' (dropdown), 'Vehicle registration *' (text), 'Start date *' (calendar), 'End date' (calendar), 'Make' (dropdown), 'Model' (dropdown), 'Engine size (cc) *' (text), 'CO2 Emission' (text), 'Colour' (dropdown), and 'Fuel type *' (dropdown). The 'Default vehicle for expenses' checkbox is checked and circled in purple. The 'Insurance' section contains 'Insurance checked' (checkbox) and 'Valid until' (calendar). A 'Save' button is circled in purple at the bottom of the form.